



## FLASH REPORT

Shari Teitelbaum and Lisa Han

**DATE:** June 30, 1997  
**TO:** Distribution  
**SUBJECT:** PARLIAMENT LIGHTS KINGS BOX - Section 24 Performance Week Ending 6/14/97

Attached are the weekly flash reports for the Parliament Lights Kings Box expansion in Section 24 for the week ending 6/14/97. Cumulative distribution data will be available with the flash report for the week ending 6/21/97. Key findings are summarized below.

### Share

Overall, share for Parliament Lights KSB, as well as for the Kings Soft and 100's, remained relatively stable in comparison to the prior week. However, since the packing's expansion, its share has grown .14 points in AOC to .35%, driven primarily by gains in C-stores (+ .23 points to .36%). Note that the share goal for Section 24 is 0.5%.

Share in stores stocking KSB grew one-tenth of a share point during the week to .64%, with the gain in C-stores (+ .20) the key driver.

Shares of all other OPB's declined (- .34) in AOC for the week ending 6/14/97. Since the Parliament KSB expansion, other OPB's total share has declined .37 share points, driven primarily by a decrease in Merit (- .25 share points).

### Distribution

For the week ending 6/14/97, Parliament Lights KSB recovered the slight distribution declines seen in supermarkets (+ 3.0 points) and C-stores (+ 1.0 points) in the prior week. Since its introduction (w/e 4/26/97), distribution in C-stores has grown 24 points, while supermarkets have shown more limited gains (+ 5.0). The KSB packing has achieved distribution in approximately two-thirds of C-stores and supermarkets in Section 24.

### Causal

Causal offers remain more evident in C-stores at 12.4% than in supermarkets (2.7%). They also showed more growth in C-stores (3.7 points) than in supermarkets (1.6 points) during the week.

### Visibility

Parliament Lights KSB visibility remained relatively stable at approximately 50% during the week ending 6/14/97 in AOC, supermarkets and C-stores. Where visible, pack racks (PM or other) remained the primary placements. Although levels are still low, visibility of the BIGIF offer at retail did rise (+ 3.2) to 9.6% for the week.

POS availability (excluding temporary displays) dropped (- 3.6), driven by declines in placement of the poster and dangler, especially in C-stores. However, the poster and dangler remained the most visible in-store POS, with the OPM talker garnering visibility.

By market, overall visibility levels were also relatively stable across all five markets for the week ending 6/14/97. Total visibility remained highest in Tampa (74.7%), followed by Orlando (73.3%) and Miami (49.3%). The visibility level of the BIGIF hologram pack offer was also highest in these three key markets, respectively. Surprisingly, some visibility of the BIGIF offer was also noted in Pensacola (6.7%), which had opted not to participate in the June promotion. Other POS availability (i.e., posters, banners, and dangles) declined in each of these markets, with the largest decrease reported in Miami (- 9.6 points to 35.1%).

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Distribution:

NYO

M. Anton  
J. Bonhomme  
S. Fuller  
A. Goldfarb  
B. Iler  
S. LeVan  
C. Levy  
A. MaCrae  
J. Mortensen  
P. Nebosky  
B. Neidle  
A. Sinha  
L. Steen  
M. Waldman

Florida

S. Caldwell (Heathrow 407-333-1613)  
A.B. Campbell (Pensacola 904-479-3266)  
W. Cashion (Heathrow 407-333-1613)  
J. Clary  
P. Egan (Tampa 813-621-2231)  
F. Messenger (Heathrow 407-333-1613)  
D. Mudd (Deerfield Beach 954-698-0074)  
G. Wren (Jacksonville 904-737-5065)

Y & R (212-210-5460)

K. McCloskey  
L. Schwed  
C. Wilson

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**PARLIAMENT LIGHTS KING SIZE BOX FLASH REPORT**  
**PM SECTION 24**

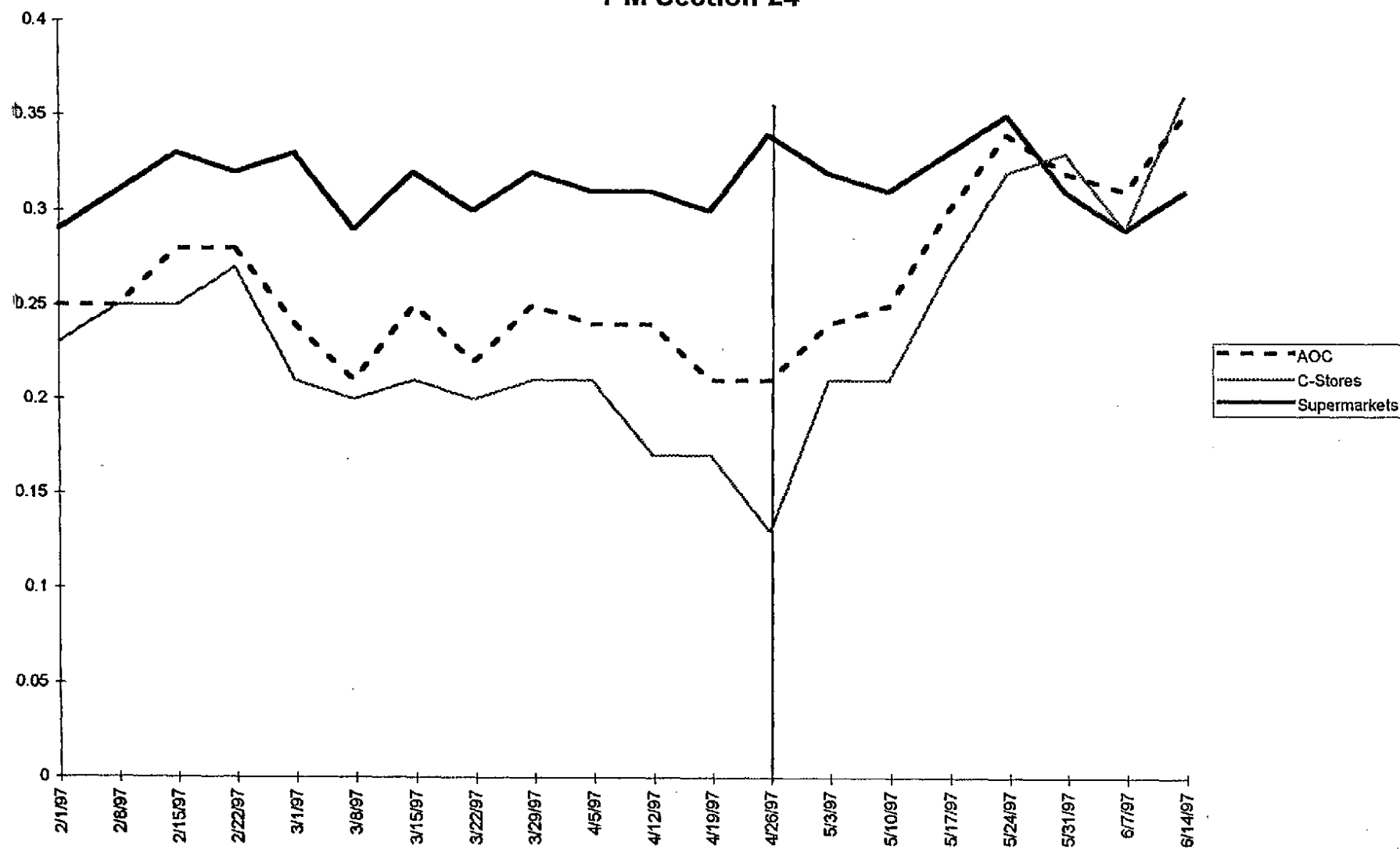
Week Ending 6/14/97

	AOC *				Supermarkets				C-Stores			
	Wk Ending 6/14/97	Diff. vs. Week Ago	Diff vs. 4/26/97	Cum Since 5/3/97	Wk Ending 6/14/97	Diff. vs. Week Ago	Diff vs. 4/26/97	Cum Since 5/3/97	Wk Ending 6/14/97	Diff. vs. Week Ago	Diff vs. 4/26/97	Cum Since 5/3/97
<b>Share</b>												
<b>Total Parliament</b>	0.82	0	0.06	0.80	0.99	0.02	-0.07	1.02	0.71	0	0.09	0.69
Kings Box	0.35	0.04	0.14	0.31	0.31	0.02	-0.03	0.32	0.36	0.07	0.23	0.29
Kings Soft	0.16	-0.02	-0.03	0.16	0.17	-0.02	-0.02	0.19	0.16	-0.02	-0.05	0.15
100's	0.31	-0.02	-0.05	0.34	0.51	0.01	-0.02	0.51	0.19	-0.04	-0.09	0.25
<b>Share In Stores Stocking</b>												
<b>Total Parliament</b>	1	0.04	0.05	0.96	1.07	0.03	-0.06	1.11	0.91	0.05	0.09	0.85
Kings Box	0.64	0.1	0	0.57	0.48	-0.01	-0.09	0.53	0.71	0.2	0.13	0.59
Kings Soft	0.33	-0.02	0	0.32	0.29	0	-0.01	0.3	0.36	-0.04	0	0.38
100's	0.47	0.04	-0.04	0.47	0.59	0.04	0	0.59	0.33	-0.01	-0.13	0.4
<b>Other OPB Share</b>												
<b>Total</b>	8.96	-0.34	-0.37	9.16	12.16	0.23	-0.03	12.15	7.5	-0.55	-0.36	7
Merit	2.03	-0.12	-0.25	2.17	2.57	0.06	-0.12	2.6	1.82	-0.18	-0.24	2.01
Virginia Slims	3.14	-0.07	-0.09	3.17	4.08	0.17	-0.04	4.06	2.67	-0.11	-0.06	2.72
Benson & Hedges	3.79	-0.15	-0.04	3.82	5.51	0	0.13	5.49	3.01	-0.26	-0.06	3.05
<b>Key Competitive Brand's Share</b>												
Marlboro	36.6	0.34	0.61	35.75	30.33	0.9	-1.03	30.31	37.96	0.17	0.95	36.99
Camel	4.59	0.08	0.54	4.36	2.33	-0.09	-0.04	2.44	5.51	0.09	0.65	5.22
Winston	5.65	-0.2	0.1	5.84	6.33	-0.18	-0.25	6.51	5.49	-0.22	0.25	5.67
Newport	5.06	0.37	0.16	4.92	4.18	-0.18	0.42	4.1	5.45	0.52	-0.01	5.36
Lucky Strike	0.16	0.01	-0.04	0.18	0.24	-0.01	0.01	0.25	0.15	0.03	-0.02	0.15
Total Discount	25.18	0.08	-0.37	25.41	21.79	-0.54	1.41	21.36	26.4	0.2	-1.16	26.89
<b>Distribution</b>												
<b>Total Parliament</b>	NA			NA	91	-2	-1		84	3	8	
Kings Box	NA			NA	66	3	5		65	1	24	
Kings Soft	NA			NA	53	-8	-8		55	0	-4	
100's	NA			NA	85	-4	-3		67	-3	10	
<b>% Causal - Kings Box</b>												
<b>Total</b>	NA			NA	2.67	1.55	NA	NA	12.43	3.71	NA	NA
B1G1F w/Hologram pack	NA			NA	1.80	0.68	NA	NA	6.21	0	NA	NA
\$.50 off 2-pack	NA			NA	0.00	0	NA	NA	0.00	0	NA	NA
<b>Price Gap vs Selected OPB - Pack</b>												
<b>Total Parliament</b>	NA			NA	\$ -	NA	NA	NA	0	NA	NA	NA
Kings Box	NA			NA	\$ -	NA	NA	NA	\$ (0.03)	NA	NA	NA
Kings Soft	NA			NA	\$ -	NA	NA	NA	\$ -	NA	NA	NA
100's	NA			NA	\$ -	NA	NA	NA	\$ -	NA	NA	NA
<b>Price Gap vs Selected OPB - Carton</b>												
<b>Total Parliament</b>	NA			NA	\$ (0.24)	NA	NA	NA	NA	NA	NA	NA
Kings Box	NA			NA	\$ -	NA	NA	NA	NA	NA	NA	NA
Kings Soft	NA			NA	\$ -	NA	NA	NA	NA	NA	NA	NA
100's	NA			NA	\$ -	NA	NA	NA	NA	NA	NA	NA

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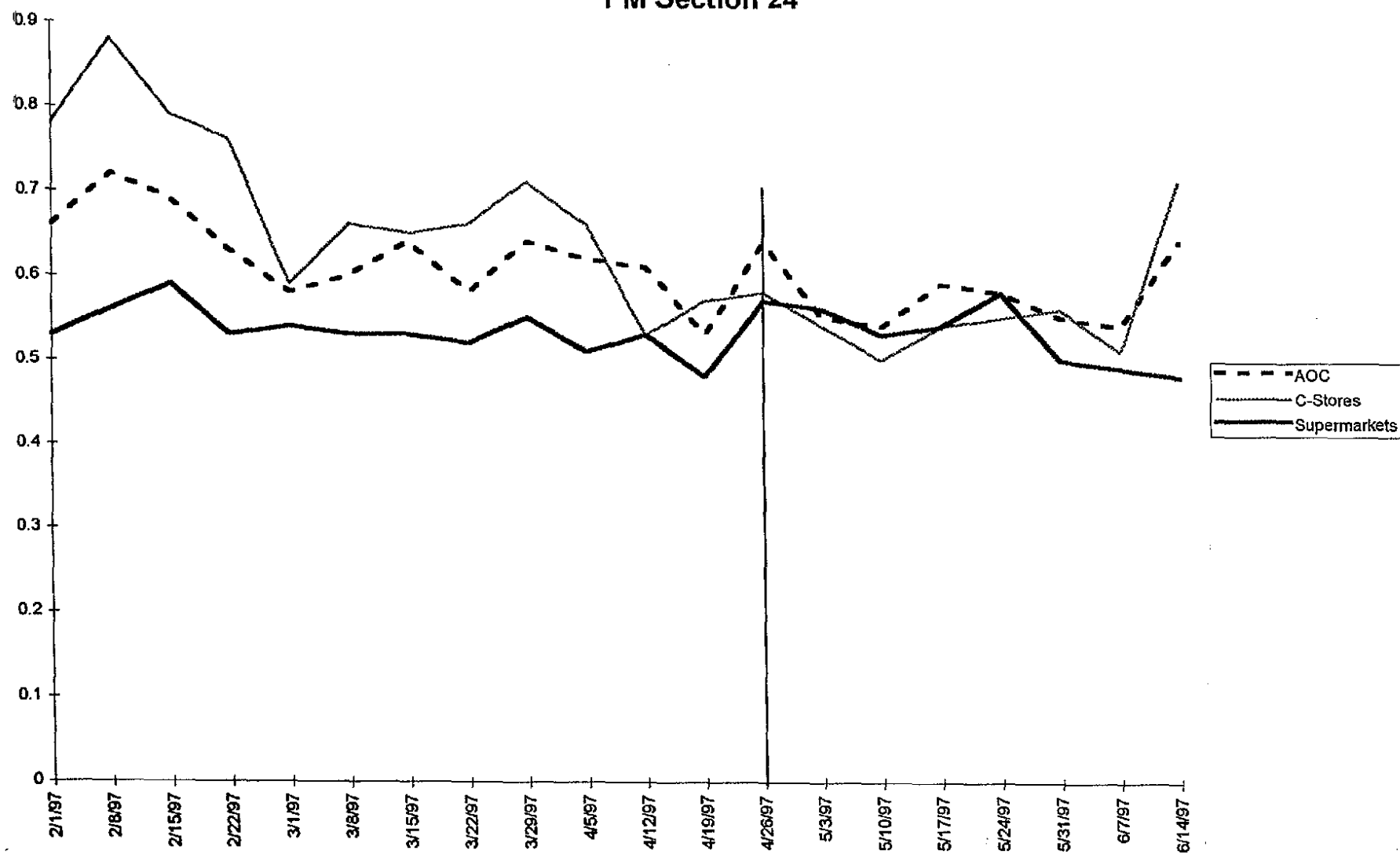
\* AOC includes supermarkets, C-stores, drug stores, and mass merchandisers. The latter two are not shown separately due to small base sizes  
Source: Nielsen Projected Store Level Data

Total Share Parliament Lts Kings Box  
PM Section 24



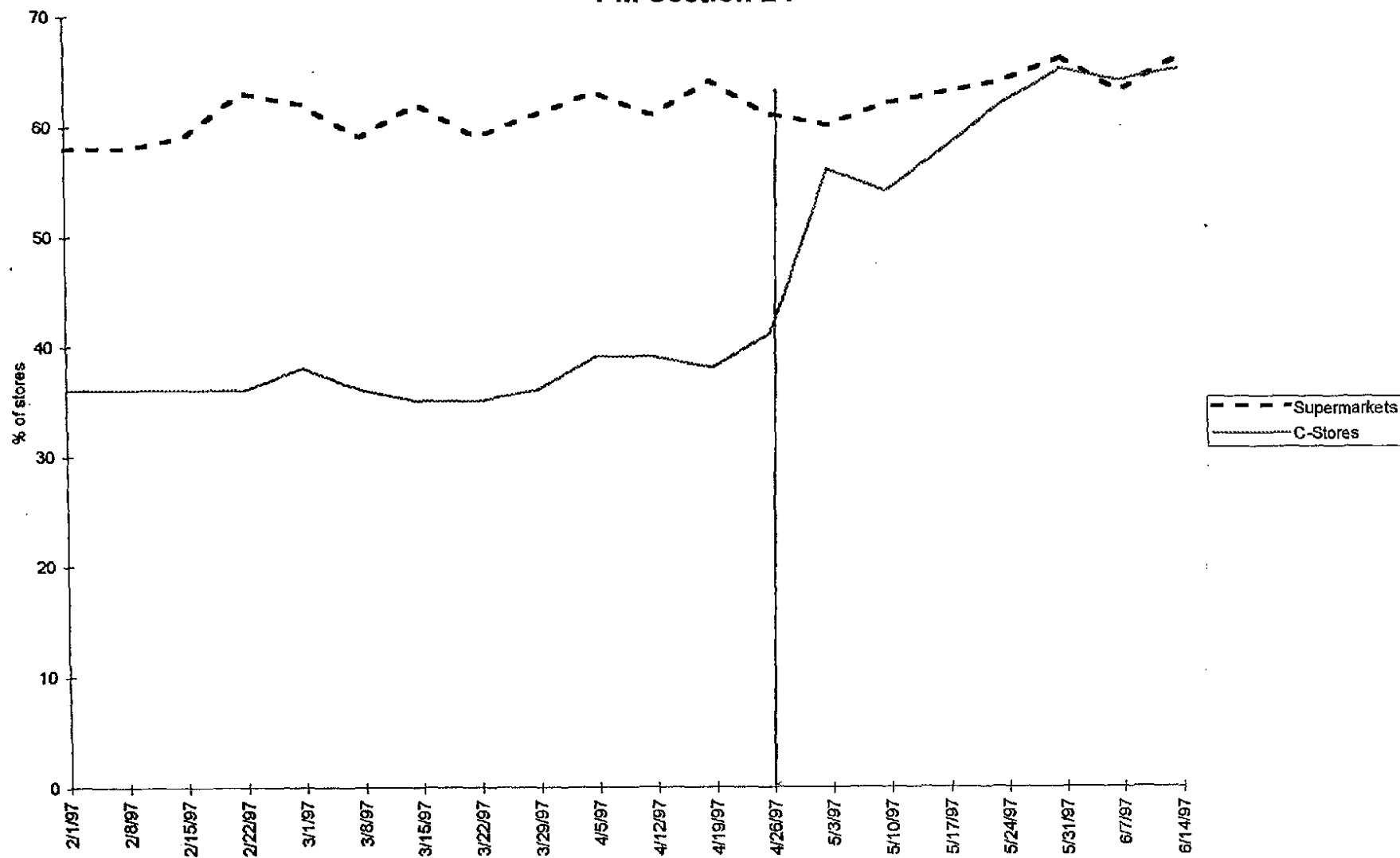
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# Parliament Lts Kings Box Share in Stores Stocking PM Section 24



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# Parliament Lts Kings Box Distribution PM Section 24



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PARLIAMENT BLUE KING SIZE BOX  
VISIBILITY REPORT  
TOTAL ALL FLORIDA

	TOTAL STORES			CONVENIENCE STORES			SUPERMARKETS		
	WEEK ENDING 6/11/97	CHANGE VS PRIOR WEEK	CUME SINCE INTRO	WEEK ENDING 6/11/97	CHANGE VS PRIOR WEEK	CUME SINCE INTRO	WEEK ENDING 6/11/97	CHANGE VS PRIOR WEEK	CUME SINCE INTRO
<u>PARLIAMENT BLUE KING SIZE BOX</u>									
% VISIBILITY	48.3	.5	56.2	45.5	.4	51.8	54.7	-	69.8
<u>WHERE LOCATED (BASED ON VISIBILITY)</u>									
ON REGULAR PHILIP MORRIS OPB PACK RACK	39.2	-1.6	45.8	49.1	-3.1	54.7	13.8	6.9	18.9
ON A SEPARATE TEMPORARY DISPLAY FOR ONLY PARLIAMENT	19.3	-1.9	29.2	20.5	-2.0	33.6	24.1	3.4	27.0
ON A REGULAR PACK RACK	48.1	2.3	63.2	45.5	5.0	55.5	44.8	-13.8	81.1
ON A REGULAR CARTON RACK	16.6	.9	23.1	8.0	.8	10.2	48.3	3.4	56.8
OTHER	2.8	2.2	4.7	1.8	.9	3.9	3.4	3.4	8.1
<u>PARLIAMENT SIGNAGE ON OPB RACK</u>									
3-D HEADER	26.7	*	28.8	30.8	.3	33.8	14.3	-	12.5
STANDARD PARLIAMENT HEADER CARD	20.3	.7	29.8	23.8	1.2	35.1	-	-	6.3
STRIPS	33.1	4.6	33.7	36.2	4.1	37.8	28.6	-	18.8
OTHER	1.7	.6	4.8	1.5	*	6.1	-	-	-
<u>PARLIAMENT BIG1F OFFER</u>									
% VISIBILITY	9.6	3.2	10.3	9.3	2.4	10.1	9.4	1.9	9.4
<u>AVITY FEED DISPLAY</u>									
% VISIBILITY (BASED ON BIG1F VISIBILITY)	88.9	-2.8	89.7	91.3	-2.8	92.0	100.0	-	100.0
% SELF SERVICE (BASED ON DISPLAY VISIBILITY)	63.9	13.9	68.6	60.9	25.6	60.9	100.0	-	100.0
<u>WHERE LOCATED (BASED ON DISPLAY VISIBILITY)</u>									
SITTING ON COUNTER NEAR REGISTER	38.9	1.4	54.3	39.1	9.7	52.2	60.0	-15.0	80.0
SITTING ON COUNTER BUT NOT NEAR REGISTER OR CHECKOUT	22.2	5.6	22.9	21.7	4.1	21.7	20.0	20.0	20.0
SITTING ON A SHELF BEHIND COUNTER	25.0	-8.3	37.1	30.4	-16.6	47.8	-	-	-
MOUNTED ON A WALL - SELF SERVE	-	-4.2	2.9	-	-	-	-	-25.0	20.0
<u>PARLIAMENT KING BOX .50 OFF 2 PACK PURCHASE</u>									
% VISIBILITY	-	-	-	-	-	-	-	-	-
<u>NON-PROMOTIONAL 20 PACK DISPLAY</u>									
% VISIBILITY	6.4	.5	13.3	7.3	-.4	16.6	1.9	1.9	1.9
% SELF SERVICE (BASED ON DISPLAY VISIBILITY)	83.3	-3.0	84.0	77.8	-6.4	82.9	100.0	100.0	100.0
<u>WHERE LOCATED (BASED ON DISPLAY VISIBILITY)</u>									
SITTING ON COUNTER NEAR REGISTER	75.0	2.3	84.0	66.7	-7.0	82.9	100.0	100.0	100.0
SITTING ON COUNTER BUT NOT NEAR REGISTER OR CHECKOUT	8.3	-.8	6.0	11.1	.6	7.3	-	-	-
SITTING ON A SHELF BEHIND COUNTER	12.5	-1.1	20.0	16.7	6.1	19.5	-	-	-
OTHER	4.2	-.4	2.0	5.6	.3	2.4	-	-	-

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PARLIAMENT BLUE KING SIZE BOX  
VISIBILITY REPORT  
TOTAL ALL FLORIDA

POS AVAILABILITY (BASED  
ON PARL BLUE KSB VISIBILITY)

	TOTAL STORES			CONVENIENCE STORES			SUPERMARKETS		
	WEEK ENDING 6/11/97	CHANGE VS PRIOR WEEK	CUME SINCE INTRO	WEEK ENDING 6/11/97	CHANGE VS PRIOR WEEK	CUME SINCE INTRO	WEEK ENDING 6/11/97	CHANGE VS PRIOR WEEK	CUME SINCE INTRO
POS AVAILABILITY (BASED ON PARL BLUE KSB VISIBILITY)	23.8	-3.6	40.1	25.9	-5.6	45.3	17.2	3.4	32.4
EXTERIOR BANNER	2.2	.5	2.8	1.8	*	1.6	-	-	-
METAL SIGN	-	-	2.8	-	-	4.7	-	-	-
LARGE CLOCK	.6	.6	.5	.9	.9	.8	-	-	-
CHANGE MAT	-	-	.9	-	-	1.6	-	-	-
REGISTER OPEN/CLOSED SIGN	-	-.6	.5	-	-	-	-	-3.4	2.7
DANGLER	11.6	-3.5	20.8	14.3	-5.5	25.8	3.4	-3.4	10.8
POSTER	9.9	-5.7	19.3	12.5	-6.4	25.0	3.4	-	5.4
MATCH CADDY W/MATCHES	.6	*	3.3	.9	*	3.9	-	-	2.7
OPM TALKER	8.8	1.6	9.4	8.9	-.1	10.2	10.3	10.3	8.1
CARTON FIXTURE TALKER	4.4	.5	7.5	5.4	.9	8.6	-	-	2.7
"LOTTERY TICKETS SOLD HERE" DECAL	.6	*	.9	.9	*	1.6	-	-	-

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PARLIAMENT BLUE KING SIZE BOX  
VISIBILITY REPORT

	TOTAL FLORIDA			MIAMI			ORLANDO			TAMPA			JACKSONVILLE			PENSACOLA		
	CHANGE			CHANGE			CHANGE			CHANGE			CHANGE			CHANGE		
WEEK	VS	CUME		WEEK	VS	CUME	WEEK	VS	CUME	WEEK	VS	CUME	WEEK	VS	CUME	WEEK	VS	CUME
ENDING	PRIOR	SINCE		ENDING	PRIOR	SINCE	ENDING	PRIOR	SINCE	ENDING	PRIOR	SINCE	ENDING	PRIOR	SINCE	ENDING	PRIOR	SINCE
6/11/97	WEEK	INTRO		6/11/97	WEEK	INTRO	6/11/97	WEEK	INTRO	6/11/97	WEEK	INTRO	6/11/97	WEEK	INTRO	6/11/97	WEEK	INTRO
<b>PARLIAMENT BLUE KING SIZE BOX</b>																		
% VISIBILITY	48.3	.5	56.2	49.3	-1.3	62.7	73.3	1.3	80.3	74.7	1.3	78.9	29.3	1.3	38.7	14.7	-	20.0
WHERE LOCATED (BASED ON VISIBILITY)																		
ON REGULAR PHILIP MORRIS OPB PACK RACK	39.2	-1.6	45.8	64.9	9.6	68.1	18.2	-7.7	27.9	51.8	-.9	53.3	18.2	-.9	24.1	36.4	-9.1	60.0
ON A SEPARATE TEMPORARY DISPLAY FOR ONLY PARLIAMENT	19.3	-1.9	29.2	2.7	-10.5	25.5	25.5	-.5	39.3	19.6	-2.2	26.7	40.9	7.6	34.5	-	-	-
ON A REGULAR PACK RACK	48.1	2.3	63.2	24.3	5.9	34.0	81.8	4.0	88.5	32.1	-2.4	46.7	45.5	7.4	72.4	45.5	-9.1	100.0
ON A REGULAR CARTON RACK	16.6	.9	23.1	21.6	5.8	17.0	36.4	3.0	44.3	-	-	3.3	-	-9.5	10.3	18.2	-	60.0
OTHER	2.8	2.2	4.7	2.7	2.7	4.3	-	-	1.6	5.4	3.5	10.0	4.5	4.5	3.4	-	-	-
<b>PARLIAMENT SIGNAGE ON OPB RACK</b>																		
3-D HEADER	26.7	*	28.8	37.1	-6.2	38.5	38.5	6.0	35.3	47.1	-7.5	60.5	7.1	.5	9.8	-	-	-
STANDARD PARLIAMENT HEADER CARD	20.3	.7	29.8	31.4	1.4	33.3	25.6	-6.8	33.3	29.4	2.1	44.7	14.3	4.3	36.6	-	-	-
STRIPS	33.1	4.6	33.7	37.1	3.8	38.5	20.5	7.0	29.4	88.2	3.4	81.6	21.4	4.8	22.0	-	-	-
OTHER	1.7	.6	4.8	-	-	2.6	5.1	5.1	3.9	2.9	-3.1	13.2	-	-	4.9	-	-	-
<b>PARLIAMENT B1G1F OFFER</b>																		
% VISIBILITY	9.6	3.2	10.3	9.3	4.0	10.7	10.7	1.3	13.2	13.3	1.3	13.2	8.0	2.7	8.0	6.7	6.7	6.7
GRAVITY FEED DISPLAY																		
% VISIBILITY (BASED ON B1G1F VISIBILITY)	88.9	-2.8	89.7	71.4	-28.6	75.0	87.5	1.8	90.0	90.0	1.1	90.0	100.0	-	100.0	100.0	100.0	100.0
% SELF SERVICE (BASED ON DISPLAY VISIBILITY)	63.9	13.9	68.6	28.6	28.6	33.3	37.5	8.9	44.4	80.0	13.3	88.9	100.0	-	100.0	80.0	80.0	80.0
WHERE LOCATED (BASED ON DISPLAY VISIBILITY)																		
SITTING ON COUNTER NEAR REGISTER	38.9	1.4	54.3	28.6	3.6	50.0	12.5	-16.1	33.3	40.0	6.7	55.6	66.7	-8.3	83.3	60.0	60.0	60.0
SITTING ON COUNTER BUT NOT NEAR REGISTER OR CHECKOUT	22.2	5.6	22.9	-	-	-	25.0	10.7	22.2	40.0	6.7	44.4	16.7	16.7	16.7	20.0	20.0	20.0
SITTING ON A SHELF BEHIND COUNTER	25.0	-8.3	37.1	42.9	-32.1	66.7	50.0	7.1	55.6	10.0	-12.2	33.3	-	-	-	20.0	20.0	20.0
MOUNTED ON A WALL - SELF SERVE	-	-4.2	2.9	-	-	-	-	-	-	-	-	-	-	-25.0	16.7	-	-	-
<b>PARLIAMENT KING BOX</b>																		
50 OFF 2 PACK PURCHASE																		
% VISIBILITY	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>NON-PROMOTIONAL 20 PACK DISPLAY</b>																		
% VISIBILITY	6.4	.5	13.3	5.3	-	13.3	17.3	2.7	25.0	4.0	-1.3	14.5	5.3	1.3	12.0	-	-	1.3
% SELF SERVICE (BASED ON DISPLAY VISIBILITY)	83.3	-3.0	84.0	75.0	-	80.0	84.6	2.8	89.5	100.0	-	100.0	75.0	-25.0	66.7	-	-	-
WHERE LOCATED (BASED ON DISPLAY VISIBILITY)																		
SITTING ON COUNTER NEAR REGISTER	75.0	2.3	84.0	75.0	-	70.0	84.6	2.8	94.7	33.3	8.3	90.9	75.0	-25.0	77.8	-	-	-
SITTING ON COUNTER BUT NOT NEAR REGISTER OR CHECKOUT	8.3	-.8	6.0	-	-	-	7.7	-1.4	10.5	33.3	8.3	9.1	-	-	-	-	-	-
SITTING ON A SHELF BEHIND COUNTER	12.5	-1.1	20.0	25.0	-	30.0	7.7	-1.4	15.8	-	-25.0	9.1	25.0	25.0	22.2	-	-	100.0
OTHER	4.2	-.4	2.0	-	-	-	-	-	-	33.3	8.3	9.1	-	-	-	-	-	-

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PARL BLUE KING SIZE BOX  
VISIBILITY REPORT

	TOTAL FLORIDA			MIAMI			ORLANDO			TAMPA			JACKSONVILLE			PENSACOLA		
	CHANGE			CHANGE			CHANGE			CHANGE			CHANGE			CHANGE		
	WEEK	VS	CUME	WEEK	VS	CUME	WEEK	VS	CUME	WEEK	VS	CUME	WEEK	VS	CUME	WEEK	VS	CUME
	ENDING	PRIOR	SINCE	ENDING	PRIOR	SINCE	ENDING	PRIOR	SINCE	ENDING	PRIOR	SINCE	ENDING	PRIOR	SINCE	ENDING	PRIOR	SINCE
	6/11/97	WEEK	INTRO	6/11/97	WEEK	INTRO	6/11/97	WEEK	INTRO	6/11/97	WEEK	INTRO	6/11/97	WEEK	INTRO	6/11/97	WEEK	INTRO
POS AVAILABILITY (BASED ON PARL BLUE KSB VISIBILITY)	23.8	-3.6	40.1	35.1	-9.6	55.3	10.9	-5.8	32.8	26.8	-2.3	41.7	40.9	7.6	48.3	-	-	-
EXTERIOR BANNER	2.2	.5	2.8	2.7	.1	4.3	1.8	*	3.3	3.6	1.8	3.3	-	-	-	-	-	-
METAL SIGN	-	-	2.8	-	-	2.1	-	-	6.6	-	-	1.7	-	-	-	-	-	-
LARGE CLOCK	.6	.6	.5	-	-	-	-	-	-	-	-	-	4.5	4.5	3.4	-	-	-
CHANGE MAT	-	-	.9	-	-	4.3	-	-	-	-	-	-	-	-	-	-	-	-
REGISTER OPEN/CLOSED SIGN	-	-.6	.5	-	-	-	-	-1.9	1.6	-	-	-	-	-	-	-	-	-
DANGLER	11.6	-3.5	20.8	21.6	-4.7	31.9	1.8	-1.9	3.3	21.4	-2.2	33.3	-	-9.5	24.1	-	-	-
POSTER	9.9	-5.7	19.3	16.2	-15.4	31.9	7.3	-2.0	21.3	14.3	-3.9	18.3	-	-4.8	6.9	-	-	-
HATCH CADDY W/MATCHES	.6	*	3.3	2.7	.1	4.3	-	-	1.6	-	-	5.0	-	-	3.4	-	-	-
OPM TALKER	8.8	1.6	9.4	5.4	.1	4.3	-	-	-	8.9	-2.0	11.7	40.9	17.1	37.9	-	-	-
CARTON FIXTURE TALKER	4.4	.5	7.5	16.2	.4	17.0	-	-	-	3.6	1.8	13.3	-	-	-	-	-	-
"LOTTERY TICKETS SOLD HERE" DECAL	.6	*	.9	-	-	-	1.8	*	1.6	-	-	1.7	-	-	-	-	-	-

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PREPARED BY FULL-LINE RESEARCH